This Office Action is response to Applicant's Request for Continued Examination filed on December 8, 2009 and an interview held with Ms. Marisa Dubuc (Reg. No. 46,673) on January 8, 2010. Currently claims 1, 7, 8, 9 15, 16, and 17 are amended and 2, 10, 22 and 23 are canceled herein. Claims 1, 3-9 and 11-21 are currently pending and allowed, as amended, below.

Continued Examination Under 37 CFR 1.114

A request for continued examination under 37 CFR 1.114, including the fee set forth in 37 CFR 1.17(e), was filed in this application after final rejection. Since this application is eligible for continued examination under 37 CFR 1.114, and the fee set forth in 37 CFR 1.17(e) has been timely paid, the finality of the previous Office action has been withdrawn pursuant to 37 CFR 1.114. Applicant's submission filed on December 8, 2009 has been entered.

Response to Amendment

The 35 U.S.C. 101 rejection of Claims 1-8 in the Final Office Action mailed September 8, 2009 is withdrawn in response to Applicant's amendments to Claims 1-8 filed December 8, 2009.

EXAMINER'S AMENDMENT

An examiner's amendment to the record appears below. Should the changes

and/or additions be unacceptable to applicant, an amendment may be filed as provided

by 37 CFR 1.312. To ensure consideration of such an amendment, it MUST be

submitted no later than the payment of the issue fee.

Authorization for this examiner's amendment was given in a telephone interview

with Ms. Marisa Dubuc on January 8, 2010.

Amendment to the Title:

A Method, System and Storage Medium For Utilizing Training Roadmaps In A

Call Center ~~Providing A Disciplined Approach To Business Management Activities~~.

Amendments to the Claims:

This listing of claims will replace all prior versions and listings of claims in this

application.

1.   (**Currently Amended**) A computer implemented method of providing a

disciplined approach for conducting business management activities <u>in a call center</u>

operating on one or more computer processors, the computer processors in

communication with a host system computer over a communication network, the

method comprising:

developing an activity list of tasks and behaviors that relate to an identified

opportunity;

performing a time study of observable behaviors associated with the activity <u>list in the call center</u>;

collecting, on the computer processors, data resulting from the time study and from performance of work activities<u>, wherein the collecting comprises generating a tally sheet, a daily load review and a daily schedule control</u>;

<u>defining key measurement indicators for the observable behaviors;</u>

identifying issues presented as a result of analyzing <u>the collected time study data</u>;

generating and implementing a roadmap for resolving the <u>identified</u> issues;

training individuals affected by the roadmap in accordance with action items contained in the roadmap;

<u>updating a database of roadmaps based upon notification of a compliance resulting from an activity assessment;</u> and

forecasting, on the computer processors, future <u>call center</u> resource requirements based upon reports generated as a result of the collecting data, identifying issues, and training individuals, wherein the future resource requirements are forecasted using the training by comparing actual progress made by individuals to planned progress for the individuals, the planned progress derived in response to a training assessment;

wherein generating a roadmap includes ranking individuals amongst one another based upon observable behaviors conducted as observed in an initial screening to identify training requirements and creating an action plan and, wherein further, training the individuals includes linking a corresponding training program with the individuals in response to the initial screening, the action plan including detailed action items and metrics that guide the individuals through the roadmap<u>; and</u>

wherein the observable behaviors comprise at least one of determining a percentage change in a number of repeat calls on a same issue over time for a work area by comparing the number of calls on the same issue with the key measurement indicators and determining a percentage change in a speed in which a customer call is answered over time for a work area by comparing a measurement of a speed in which a customer cal is answered with key measurement indicators.

2.   (Cancelled)

3.   (Previously Presented) The method of claim 1, wherein developing an activity list includes:

establishing goals and strategies for exploiting the opportunity;

documenting the goals and strategies; and

communicating the goals and strategies to affected individuals.

4.   (Previously Presented) The method of claim 3, further comprising using information in the activity list to develop an activity detail summary comprising:

documenting current workflow conditions and requirements;

identifying key volume indicators;

identifying activities and creating an activity list summary; and

identifying key measurement indicators.

5. (Previously Presented) The method of claim 4, wherein the key volume indicators are derived by:

comparing like work units and validating differences between processes used in the like work units; and

establishing engineering service metrics and reasonable expectations resulting from the comparing like work units;

wherein the engineering service metrics include best demonstrated practices for activities conducted in the work units; and

wherein the key measurement indicators measure performance, service, quality, and effectiveness of work performed and quantify results into relevant measurements.

6.   (Previously Presented) The method of claim 1, wherein training the individuals further includes:

evaluating the individuals to determine current skill levels and skills flexibility, the skills flexibility identifying relative strengths and weaknesses within a team of individuals from a training standpoint; and

conducting a pre-training assessment to calibrate the skills of the individuals prior to training, and conducting a post-training assessment to measure the skills retained by the individuals after conducting the training;

wherein the pre-training assessment and the post-training assessment assess skills training needs for three skill areas, including:

basic skills that define basic foundational elements needed to perform a job;

fundamental skills that define an advanced set of skills desirable for optimally performing a job; and

advanced skill areas that define unique or special skills required to perform a job.

7.   **(Currently amended)** The method of claim 1, wherein performing a time study of observable behaviors further includes:

identifying behaviors to observe;

observing the behaviors;

determining statistical validity of observations;

defining metrics for the behaviors; and

documenting the observations; and

~~identifying issues resulting from the observations~~.

8. **(Currently amended)** The method of claim 1, wherein the ~~collecting resulting from performance of work activities includes~~: tally sheet specifies detailed work volumes, ~~generating a daily load review,~~ the daily load review ~~comprising~~ comprises the calculation of the work volume to be completed and an amount of labor to produce the work volume, ~~; creating a daily schedule control using the tally sheet and the daily load review~~ and the daily schedule control is created using the tally sheet and the daily load review, the daily schedule control including:

       productivity data;

       percentage of overtime data;

       earned hours; and

       lost time;

wherein the method further comprises:

conducting a daily employee performance review including:

       meeting with employees to review prior day performance;

       gathering lessons learned; and

       applying lessons learned to future operations; and

generating a daily planner including:

gathering the results of the daily load review;

gathering the results of the daily schedule control; and

gathering the results of the daily performance review.

9. **(Currently amended)** A storage medium encoded with machine-readable computer program code for providing a disciplined approach for conducting business management activities <u>in a call center</u>, the storage medium including instructions for causing a server to implement a method, comprising:

developing an activity list of tasks and behaviors that relate to an identified opportunity;

performing a time study of observable behaviors associated with the activity <u>list in the call center</u>;

collecting data resulting from the time study and from performance of work activities<u>, wherein the collecting comprises generating a tally sheet, a daily load review and a daily schedule control</u>;

<u>defining key measurement indicators for the observable behaviors</u>;

identifying issues presented as a result of analyzing <u>the collected time study data</u>;

generating and implementing a roadmap for resolving the <u>identified</u> issues;

training individuals affected by the roadmap in accordance with action items contained in the roadmap;

<u>updating a database of roadmaps based upon notification of a compliance resulting from an activity assessment</u>; and

forecasting future <u>call center</u> resource requirements based upon reports generated as a result of the collecting data, identifying issues, and training individuals, wherein the future resource requirements are forecasted using the training by comparing actual progress made by individuals to planned progress for the individuals, the planned progress derived in response to a training assessment;

wherein generating a roadmap includes ranking individuals amongst one another based upon observable behaviors conducted as observed in an initial screening to identify training requirements and creating an action plan and, wherein further, training the individuals includes linking a corresponding training program with the individuals in response to the initial screening, the action plan including detailed action items and metrics that guide the individuals through the roadmap; <u>and</u>

<u>wherein the observable behaviors comprise at least one of determining a percentage change in a number of repeat calls on a same issue over time for a work area by comparing the number of calls on the same issue with the key measurement indicators and determining a percentage change in a speed in which a customer call is answered over time for a work area by comparing a measurement of a speed in which a customer cal is answered with key measurement indicators.</u>

10.   (Cancelled)

11.   (Previously Presented) The storage medium of claim 9, wherein developing an activity list includes:

establishing goals and strategies for exploiting the opportunity;

documenting the goals and strategies; and

communicating the goals and strategies to affected individuals.

12.   (Previously Presented) The storage medium of claim 11, further comprising instructions for causing the server to implement:

using information in the activity list to develop an activity detail summary comprising:

documenting current workflow conditions and requirements;

identifying key volume indicators;

identifying activities and creating an activity list summary; and

identifying key measurement indicators.

13.   (Previously Presented) The storage medium of claim 12, wherein the key volume indicators are derived by:

comparing like work units and validating differences between processes used in the like work units; and

establishing engineering service metrics and reasonable expectations resulting from the comparing like work units;

wherein the engineering service metrics include best demonstrated practices for activities conducted in the work units; and

wherein the key measurement indicators measure performance, service, quality, and effectiveness of work performed and quantify results into relevant measurements.

14.   (Previously Presented) The storage medium of claim 9, wherein training the individuals further includes:

evaluating the individuals to determine current skill levels and skills flexibility, the skills flexibility identifying relative strengths and weaknesses within a team of individuals from a training standpoint; and

conducting a pre-training assessment to calibrate the skills of the individuals prior to training, and conducting a post-training assessment to measure the skills retained by the individuals after conducting the training;

wherein the pre-training assessment and the post-training assessment assess skills training needs for three skill areas, including:

basic skills that define basic foundational elements needed to perform a job;

fundamental skills that define an advanced set of skills desirable for optimally performing a job; and

advanced skill areas that define unique or special skills required to perform a job.

15.   (**Currently amended**) The storage medium of claim 9, wherein the performing a time study of observable behaviors further includes:

identifying behaviors to observe;

observing the behaviors;

determining statistical validity of observations;

defining metrics for the behaviors; and

documenting the observations; and

~~identifying issues resulting from the observations~~.

16.   (**Currently amended**) The storage medium of claim 9, wherein ~~collecting resulting from performance of work activities includes: generating a~~ the tally sheet specifies detailed work volumes, ~~generating a daily load review~~ the daily load review ~~comprising~~ comprises the calculation of the work volume to be completed and an amount of labor to produce the work volume, ~~creating a~~ and the daily schedule control is

<u>created</u> using the tally sheet and the daily load review, the daily schedule control including:

> productivity data;

> percentage of overtime data;

> earned hours; and

> lost time;

<u>wherein the method further comprises:</u>

conducting a daily employee performance review including:

> meeting with employees to review prior day performance;

> gathering lessons learned; <u>and</u>

> applying lessons learned to future operations; and

generating a daily planner including:

> gathering the results of the daily load review;

> gathering the results of the daily schedule control; and

> gathering the results of the daily performance review.

17.   (**Currently amended**) A system for providing a disciplined approach for conducting business management activities <u>in a call center</u>, comprising:

a server;

a business management system executing on the server, the business management system implementing a method, comprising:

developing an activity list of tasks and behaviors that relate to an identified opportunity;

performing a time study of observable behaviors associated with the activity <u>list
in the call center</u>;

collecting data resulting from the time study and from performance of work
activities<u>, wherein the collecting comprises generating a tally sheet, a daily load review
and a daily schedule control</u>;

<u>defining key measurement indicators for the observable behaviors;</u>

identifying issues presented as a result of analyzing <u>the collected time study
data</u>;

generating and implementing a roadmap for resolving the <u>identified</u> issues;

training individuals affected by the roadmap in accordance with action items
contained in the roadmap;

<u>updating a database of roadmaps based upon notification of a compliance
resulting from an activity assessment;</u> and

forecasting future <u>call center</u> resource requirements based upon reports
generated as a result of the collecting data, identifying issues, and training individuals,
wherein the future resource requirements are forecasted using the training by
comparing actual progress made by individuals to planned progress for the individuals,
the planned progress derived in response to a training assessment;

wherein generating a roadmap includes ranking individuals amongst one another
based upon observable behaviors conducted as observed in an initial screening to
identify training requirements and creating an action plan and, wherein further, training
the individuals includes linking a corresponding training program with the individuals in
response to the initial screening, the action plan including detailed action items and
metrics that guide the individuals through the roadmap<u>; and</u>

<u>wherein the observable behaviors comprise at least one of determining a
percentage change in a number of repeat calls on a same issue over time for a work
area by comparing the number of calls on the same issue with the key measurement</u>

indicators and determining a percentage change in a speed in which a customer call is answered over time for a work area by comparing a measurement of a speed in which a customer cal is answered with key measurement indicators.

18.   (Previously Presented) The system of claim 17, wherein developing an activity list includes:

establishing goals and strategies for exploiting the opportunity;

documenting the goals and strategies; and

communicating the goals and strategies to affected individuals, the method further comprising:

using information in the activity list to develop an activity detail summary comprising:

documenting current workflow conditions and requirements;

identifying key volume indicators;

identifying activities and creating an activity list summary; and

identifying key measurement indicators.

19. (Previously Presented) The system of claim 18, wherein the key volume indicators are derived by:

comparing like work units and validating differences between processes used in the like work units; and

establishing engineering service metrics and reasonable expectations resulting from the comparing like work units;

wherein the engineering service metrics include best demonstrated practices for activities conducted in the work units; and

wherein the key measurement indicators measure performance, service, quality, and effectiveness of work performed and quantify results into relevant measurements.

20.   (Previously Presented) The system of claim 17, wherein training the individuals further includes:

evaluating the individuals to determine current skill levels and skills flexibility, the skills flexibility identifying relative strengths and weaknesses within a team of individuals from a training standpoint; and

conducting a pre-training assessment to calibrate the skills of the individuals prior to training, and conducting a post-training assessment to measure the skills retained by the individuals after conducting the training;

wherein the pre-training assessment and the post-training assessment assess skills training needs for three skill areas, including:

basic skills that define basic foundational elements needed to perform a job;

fundamental skills that define an advanced set of skills desirable for optimally performing a job; and

advanced skill areas that define unique or special skills required to perform a job.

21.   (Previously Presented) The method of claim 5, wherein the observable behaviors are percentage of telephone calls answered within an average speed, the average speed determined by the key measurement indicators.

22.   (Cancelled)

23.   (Cancelled)

ALLOWANCE

The following is an Allowance in response to Applicant's Request for Continued

Examination filed on December 8, 2009 and an interview held with Ms. Marisa Dubuc

(Reg. No. 46,673) on January 8, 2010. Currently claims 1, 7, 8, 9 15, 16, and 17 are

amended and 2, 10, 22 and 23 are canceled herein. Claims 1, 3-9 and 11-21 are

currently pending and allowed, as amended, above.

REASONS FOR ALLOWANCE

The following is an examiner's statement of reasons for allowance.

The present invention is directed to system and method for generating and

implementing training roadmaps in a call center based on time studied/observable

behaviors and forecasting future call center resource requirements based on the

observed behaviors and training roadmaps.

The closest prior art Michaels, Work Measurement (1989), Nation et al., U.S.

Patent Publication No. 2007/0203771, Leehman, U.S. Patent Publication No.

2005/0043976, Kaplan et al., Linking the Balanced Scorecard to Strategy, Goodkovsky,

U.S. Patent No. 6,807,535, Denton, Work Sampling: Increasing Service and White

Collar Productivity, Wilde, A Performance Control System, Bluepumpkin Software

PrimeTime F&S and McConnell, U.S. Patent No. 7,158,628 fail to teach or suggest

either singularly or in combination a system and method for managing a call center

comprising: developing an activity list of tasks and behaviors that relate to an identified

opportunity; performing a time study of observable behaviors associated with the

activity list in the call center; wherein the observable behaviors comprise at least one of determining a percentage change in a number of repeat calls on a same issue over time for a work area by comparing the number of calls on the same issue with the key measurement indicators and determining a percentage change in a speed in which a customer call is answered over time for a work area by comparing a measurement of a speed in which a customer cal is answered with key measurement indicators; collecting, on the computer processors, data resulting from the time study and from performance of work activities, wherein the collecting comprises generating a tally sheet, a daily load review and a daily schedule control; defining key measurement indicators for the observable behaviors; identifying issues presented as a result of analyzing the collected time study data; generating and implementing a roadmap for resolving the identified issues; wherein generating a roadmap includes ranking individuals amongst one another based upon observable behaviors conducted as observed in an initial screening to identify training requirements and creating an action plan and, wherein further, training the individuals includes linking a corresponding training program with the individuals in response to the initial screening, the action plan including detailed action items and metrics that guide the individuals through the roadmap; training individuals affected by the roadmap in accordance with action items contained in the roadmap; updating a database of roadmaps based upon notification of a compliance resulting from an activity assessment; and forecasting, on the computer processors, future call center resource requirements based upon reports generated as a result of the collecting data, identifying issues, and training individuals, wherein the future resource requirements are forecasted using the training by comparing actual progress made by individuals to planned progress for the individuals, the planned progress derived in response to a training assessment as recited in independent Claims 1, 9 and 17.

Any comments considered necessary by applicant must be submitted no later than the payment of the issue fee and, to avoid processing delays, should preferably

accompany the issue fee. Such submissions should be clearly labeled "Comments on Statement of Reasons for Allowance."

Conclusion

Any inquiry concerning this communication or earlier communications from the examiner should be directed to SCOTT L. JARRETT whose telephone number is (571)272-7033. The examiner can normally be reached on Monday-Friday, 8:00AM - 5:00PM.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Bradley Bayat can be reached on (571) 272-6704. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see http://pair-direct.uspto.gov. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Scott L Jarrett/
Primary Examiner, Art Unit 3624